

## **EDITED TASK LISTING**

### **CLASS: ASSOCIATE BUDGET ANALYST**

*NOTE: Each position within this classification may perform some or all of these tasks.*

1.	Analyzes and reviews the fiscal impact and feasibility of Capital Outlay Budget Change Proposals, Budget Change Proposals, Finance Letters, Legislation, departmental deficiencies etc., and provides technical support, feedback, and recommendations for baseline changes, augmentations, appropriations, and re-appropriations to program staff utilizing prior year funding decisions, Strategic Plan, current projections including construction costs, CALSTARS reports, workload studies, etc., based on programmatic needs.
2.	Responds to questions and inquiries regarding the fiscal impact and feasibility of Capital Outlay Budget Change Proposals, Budget Change Proposals, Finance Letters, Legislation, departmental deficiencies etc., to provide feedback to control agency staff utilizing prior year funding decisions, Strategic Plan, current projections including construction costs, CALSTARS reports, workload studies, etc., upon request.
3.	Reviews various data (e.g., population reports, construction schedules, etc.) to establish inmate to staff ratio, associated funding, cost changes or project re-appropriations and/or May Revision changes utilizing various resources (e.g., Average Daily Population (ADP) reports, various computer software, policies, procedures, etc.) in accordance with various policies and procedures, etc.
4.	Analyzes proposed legislation to determine funding impact on department programs utilizing various data sources (e.g., population reports, Public Works Board reports, subject matter experts, construction schedules, etc.) in accordance with various policies and procedures, etc.
5.	Coordinates and assists in technical preparation, assembly, and distribution of budget documents, their appendices, and other technical publications to management and outside control agencies utilizing Reproduction Services, clerical staff, quality control, check lists, management and agency sign off, etc., in accordance with State Administrative Manual (SAM) 6000, DOF Budget Letters and various policies, procedures, etc.
6.	Analyzes and reconciles departmental appropriations by source of funding with State Controllers' Office and DOF to maintain accurate budget authority utilizing various procedures and/or processes (e.g., Executive Orders, Budget Revisions, Allocation Orders, etc.) in accordance with SAM, Departmental Operations Manual (DOM), and various policies, procedures, etc.
7.	Prepares, processes, and schedules departmental appropriations to the individual accounting offices utilizing allocation orders to distribute spending authority to each accounting office in accordance with the Budget Act and/or Special Legislation.

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8.	Prepares current year initial allotment and budget changes based on authorized funding for each division/institution by utilizing various spreadsheets (e.g., Funds Availability Report, Fund By Program, Schedule of Requirements, etc.) in accordance with various policies, procedures, etc.
9.	Reviews and prepares budget schedules to produce the Governor's Budget utilizing CALSTARS, accounting records, internal databases, etc., in accordance with the DOF Budget Letters, SAM 6000, DOM and various policies, procedures, etc.
10.	Reviews, analyzes, and evaluates fiscal expenditures and projections to identify the fiscal status of a program and at mid-year, presents recommendations to Executive Staff on status of institution/division's budget and construction schedules for re-appropriation utilizing various data (e.g., Monthly Budget Plan, CALSTARS, etc.) in accordance with various laws, rules, policies, procedures, etc.
11.	Assists program staff in planning, forecasting, and developing standards which are translated into requirements for personnel, equipment and funds to produce fiscal and personnel estimates/projections utilizing expenditure history, budget database, economic/population projections, etc., upon request of program and control agency staff.
12.	Advises administrators and managers on program issues in order to provide information for management to make informed decisions utilizing personal knowledge, data analysis, field communication, etc., as necessary.
13.	Reviews personnel transaction documents to ensure funding and position authority are appropriate using the Governor's Budget, Pay Scales, etc. in accordance with SAM 6000 and various policies, procedures, etc.
14.	Prepares Supplementary Schedule of Salary and Wages (Schedule 7A and 8), to reconcile position control with the State Controllers' Office and departmental personnel offices utilizing the Position Control Roster (TAB), Recap, Changes in Authorized Positions (Form 607), etc., in accordance with SAM 6000, DOF, and various policies, procedures, etc.
15.	Upon request of executive management, conducts special studies/projects to analyze budgetary activities and relationships of various state agencies/programs and provide information for briefing documents/issue papers as a planning tool for management decisions utilizing various resources (e.g., collateral contacts, various reports, policies, procedures, etc.).
16.	Maintains records and files to produce reference material, backup documentation, decision making rationale, etc. utilizing filing systems, clerical staff, records retention schedule, etc., in accordance with SAM, DOM, management directives, various policies and procedures, etc.

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<b>17.</b>	Represents the department at meetings/conferences/committee hearings/training seminars etc. to provide departmental expertise and input utilizing visual aids, handouts, technical knowledge, etc., upon request of management.
<b>18.</b>	As directed, acts as lead to staff on various assignments to provide guidance, training, scheduling, review work, set priorities, etc. and provide feedback to management utilizing communications skills, desk references, meetings, project management tools, etc.
<b>19.</b>	Participates in the development of policies and procedures relating to the Department's fiscal impact to ensure consistency, compliance, and conformity with governmental and regulatory agencies utilizing research tools, Budget Database, program staff, other correctional facilities, etc., as needed and/or upon request.
<b>20.</b>	Prepares proposed legislation (Budget Act or Special Legislation) for Capital Outlay projects to determine funding impact on department programs utilizing various data sources (e.g., Board reports, subject matter experts, etc.) in accordance with various policies, procedures, etc.
<b>21.</b>	Prepares Schedule 10s, Reconciliation With Appropriations, Language Sheets and Planning Estimates, to reconcile projects for the Governor's Budget utilizing CALSTARS Reports, Executive Order, augmentations/reversions, etc., in accordance with SAM 6000, DOF and various policies, procedures, etc.